

WebRater Tips **FAQ's**

1. Searching for a risk?

When looking for terms, it is best to search by the Insureds name (as entered into the system) or the control/quote number. The search results should be checked against the status, policy type and modified date columns to make sure you are getting the correct terms.

2. Do you need to go back to a certain page and update information e.g., turnover, or want to change the limit options?

You can easily navigate between pages by using the navigation bar at the top of the screen.

3. Want to bind multiple products for a client?

On the binding screen, you can bind multiple products simultaneously. Select which limit option you want under each product and then click Bind.

4. Forgotten your password?

Easily reset your password by clicking on the 'forgot password' link on the login screen.

5. Want to know what products are available for your client's occupation?

When on the WebRater homepage, click on Available Occupations on the navigation bar. Type in the keywords of the occupation name e.g., 'engineering' to receive a list of available occupations. Click on the relevant occupation and the system will display which products are available for that occupation.

6. Has your risk been referred or declined?

You can easily see the reason why a risk has referred or declined on the Build Quote screen. Next to the product, it will say that the product has been referred or declined and at the top of the screen, you can expand 'Referral Reason(s)' and it will provide a list of reasons for the referral or decline.



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7. Do you want to add on additional products to your terms?

You don't have to create a new risk and enter all the basic information again. Search for the existing risk you have set up and click into it. Go to the Choose Coverage page (through the navigation bar at the top of the screen) and select the additional products you would like to include.

8. Want to pro rata a policy?

On the Build Quote screen and/or the Binding Screen, the policy period is defaulted to 12 months. You can easily change the expiry date to any date between 6 months – 18 months from inception and the price will automatically adjust for you.

9. Provided terms for a product that the client no longer wants?

If you have quoted multiple products for a client and there is one that they no longer require, you can easily remove these from terms or binding by clicking 'deselect' next to the product on the Build Quote or Binding screen.

10. Want to provide further information to DUAL?

There is a 'Contact DUAL' button on the WebRater which you can click on to provide further commentary or attach additional information you think may be relevant to the client.

11. Already quoted or bound the risk but need a copy of the documents?

You can easily get a copy of quote terms by going into the risk and navigating to the Quote screen and selecting 'email quote' to receive a copy of terms, or 'view/download' to download terms.

To receive a copy of the policy documents, go to the Policy tab and search for the risk. Click 'regenerate policy documents' to be sent a copy of the Policy schedule.

12. What do the different statuses mean against a risk?

Incomplete – only the basic information or underwriting questions have been completed.

Indication – reached Build Quote stage.

Quoted – reached formal quote stage (sending formal terms)

Bound – bound policy.

Cancelled – policy has been cancelled.

Referred – product has referred.

Declined – product has referred.

13. Need to add access for a new staff member or remove access for someone who has left?

This can easily be done by navigating to the 'User Management' section under the icon in the top right corner. Here you can quickly add a new user (without them having to complete the full sign-up process), edit someone's details or deactivate/remove a user.